

OFFICE OF THE STATE PUBLIC DEFENDER

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Case Information Management Project (CIMP)

PRESENTATION TO THE MONTANA PUBLIC DEFENDER IT COMMITTEE

March 2, 2007

What are the goals of the project team?

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Define the business processes and the information requirements to:

- ✓ Implement best work practices system-wide.
- ✓ Write procedures to standardize case processing.
- ✓ Standardize input to software.
- ✓ Provide required and desired reporting.

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Define the Case Management System requirements to:

- ✓ Recommend near-term changes/costs to the Steering Committee to implement JustWare correctly and implement the approved changes.
- ✓ Develop and issue a Request for Proposal (RFP) for a long-term Case Management solution.

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Establish a training program to:

- ✓ Communicate case information management rules.
- ✓ Provide users the knowledge on how to use tools.

Why make JustWare work & not just focus on a RFP?

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Not enough time left in FY 2007:

- ✓ To gather information in accordance with ITSD and Purchasing Requirements.
- ✓ To obligate funds that are available in FY 2007 but not available in FY 2008 and beyond.

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May not have enough money in FY 2007:

- ✓ Initial survey data indicated that we may not be able buy, install, and provide maintenance for a system that would work for us with the money appropriated.

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What about the Request for Proposal (RFP)?

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Why do a RFP if we are improving JustWare?

- ✓ We will find the best long term solution that fits our agency's needs.
- ✓ We have certain users that are unhappy with JustWare's performance.
- ✓ We will be able to use the results of a RFP to support a budget item for the next biennium (budget items are due 1 year from this May).

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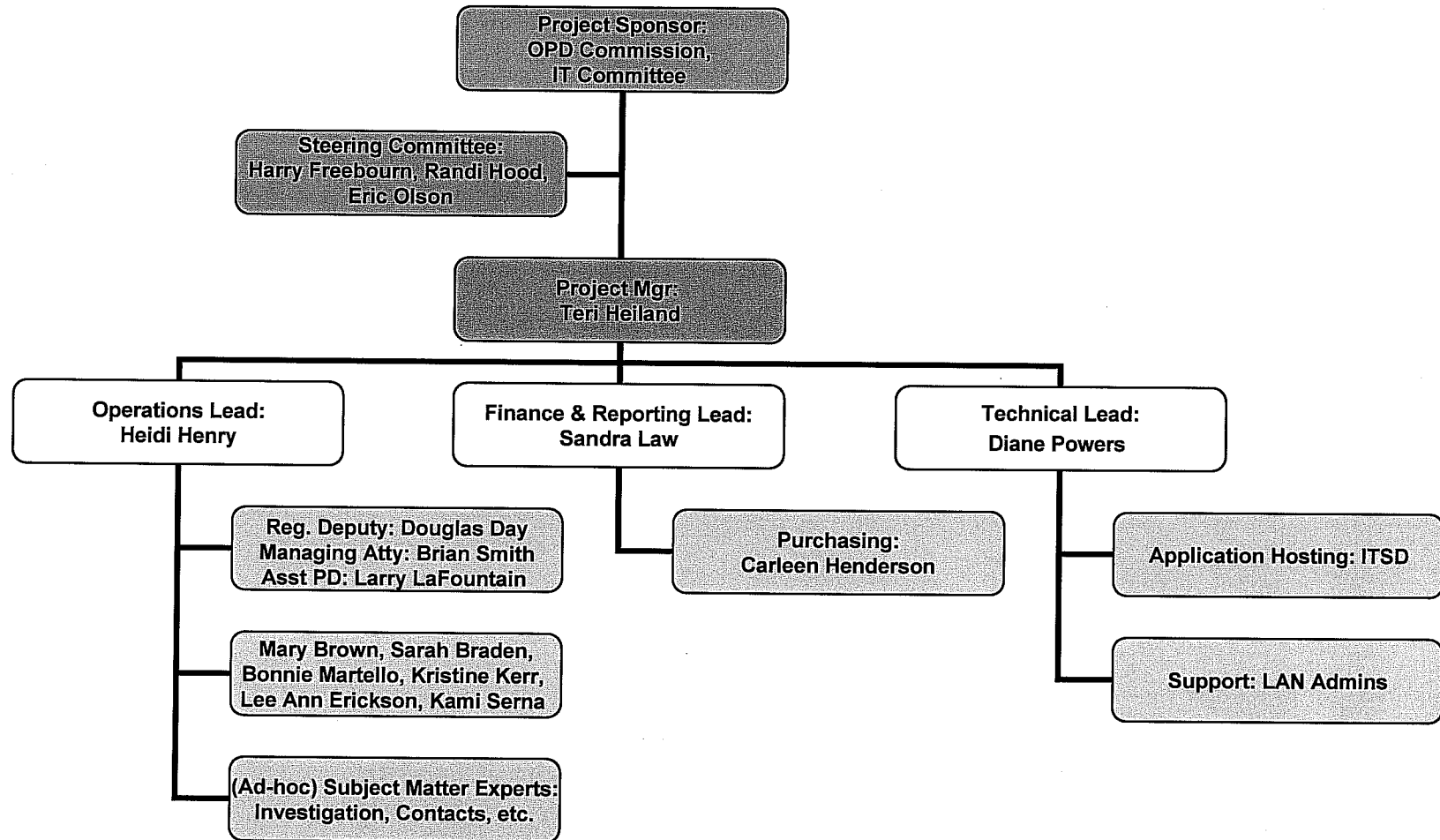
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How do we compile information for a RFP?

- ✓ The project team will do this at the same time that they are making JustWare more usable.
- ✓ Intensive – short term sessions.
- ✓ Feed back of what is useful vs. not useful.

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Who do we need to make this project successful?



What is the function of the leadership?

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Project Sponsor

- ✓ Approves the project resources.
- ✓ Provides project oversight.

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Steering Committee

- ✓ Sets the direction of the project.
- ✓ Gets resources for the project – money, people, etc.

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Project Manager

- ✓ Manages project plan.
- ✓ Ensures the project hits planned milestones.
- ✓ Reports status to Sponsor and Steering Committee.

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What is the project team tasked with?

Task	Cost	Time
Define rules that everyone will follow as they load information into the system.	\$6,000	Workshop the Week of March 5
Buy enough licenses to be used by non-attorney and attorney staff.		Purchase prior to June 30, 2007
Move 4 data bases into one data base and configure the system to follow our rules.		Start contract with JustWare no later than April 15
Get the "good reports" out to all offices.		Start contract with JustWare no later than April 15
Replace the SLAW system (time tracking/financial reporting).		Determine options by April 6
Train – Train – Train!		As soon as appropriate
Start RFP.		Information gathering in progress
Total Cost	\$\$\$	Obligate funds by June 30, 2007

Summary of the Case Information Management Project

A Project Team has been identified to:

- ✓ Define how we process our case information and identify our reporting requirements.
- ✓ Recommend changes to JustWare to meet our immediate needs and implement approved changes.
- ✓ Establish a training program.
- ✓ Issue a Request for Proposal (RFP) for a long-term solution.

Why?

- ✓ Not enough time to issue a RFP before June 30.
- ✓ May not have enough money in this years budget to cover new system.
- ✓ Will be able to use the results of a RFP to support a budget item for the next biennium (budget items are due 1 year from this May).

Next Steps

- ✓ Hosting workshop week of March 5 in Butte for CIMP team to define:
 - ✓ Changes to JustWare (short-term solution).
 - ✓ Business requirements for a RFP (long-term solution).
- ✓ Get a proposal from New Dawn on JustWare enhancements/changes.
- ✓ Obligate funds prior to June 30.
- ✓ Implement changes and training program ASAP.

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